Solo™

Setup Section and Template Editor

(See the Quick Start Guide for abbreviated instructions)

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1. General Information – Read Me First!

Purpose of this Manual – Initial Setup

The purpose of this manual is to assist you in the process of entering Vendors, Contracts, Benefit Plans, and COBRA Rates. Once the basic Setup is accomplished, you will want to refer to the Solo User's Manual for procedural assistance, including renewals, revisions to the original data entered, and entering or importing COBRA eligible plan participants. All manuals can be used electronically from Help or they can be printed.

Solo Desktop Icons

After Solo has been installed, there will be two icons on your Windows Desktop. One is labeled "Solo" and the other is the "Solo Template Editor".

Solo (COBRA Application)

This is where you set up Solo and perform all day-to-day COBRA tasks.

Solo Template Editor

This is where you review, test print, edit the sample COBRA Notices, Election Forms, and a variety of other frequently used notices and letters. You DO NOT issue Notices here.

The Logon Process

You open Solo by clicking on the Solo icon on your Windows desktop. Each time you open Solo, you will go through the Logon procedure and, then, you will come to the "Main Menu".

If you don't change the default security settings, the User Name will always be "affordable" and the password will be left blank. This can be done at any time.

Solo Main Menu

At the Main Menu, you can choose to go to Setup, Admin or Help.

Backing Up Your Data

Please refer the separate document for Utilities and Importing Data.

Contacting Us for Service

Email: services@affordablesolutions.com or telephone: 206.729.1571, ext. 3

2. Main Menu Bar and Password Protected Security

After you go through the Logon process and open Solo to the Main Menu, you will find the following from the menu bar.

Utilities

Password Protected Security

This is an optional feature and can be set up at any time. Please note that, at the present time, the Solo Template Editor is not password protected. Until you establish password protected security, "affordable" will be the default User Name and there will be no password. Anyone opening Solo will have access to all functions.

The person designated as the Database Manager will want to establish their password right away. Secondarily, they will want to establish the User Name, Password, User Description, and permissions of each user.

> Be careful in creating the Database Manager's password! If you make a typing mistake and can't re-create your password, you will need to uninstall Solo and start over. To test your password, exit Solo and, then, Logon.

Add a Password for the Database Manager

1. From your Start button menu and Programs, select the program group labeled "Solo Database Manager".
2. The first screen will be the "User Login Screen". The password should be left blank until you set up a new password(s) in Password Protected Security.
3. After you Login, Security is found in Utilities.
4. Assign a Password for the Database Manager.

5. If desired, you can turn off permissions by de-selecting the function descriptions. This would, however, be unusual for the Database Manager not to have access to all functions.

Be careful in creating the Database Manager's password! If you make a typing mistake and can't re-create your password, you will need to uninstall Solo and start over. To test your password, exit Solo and, then, Logon.

Adding Users

By default and until you change the permissions; each user will have access to all functions EXCEPT the Setup section of Solo.

1. Choose Add to enter a new User.
2. Enter the User Name, Password, User Description and check the permissions for each function that the new User will have access to while using Solo.

Update

This utility is used when installing an update or upgrade to Solo.

ReLink or Reconnect Data

Used after a network or an installation to other than the default "C" Directory. Instructions are on the Network Installation Guide and from this utility.

Importing Data

You can import data on active employees, PQBs and dependents. This is addressed in the separate Import and Utilities document found in your COBRA Notebook in Section II.

Exporting Data

This is addressed in the Solo User's Manual.

Edit Data Records - Edit or Delete Employee PQB, Dependent and Plan Data – Caution!

- Edit PQB or Employee Data – This is the only area in Solo where an employee or PQB record can be deleted in its entirety without an audit trail.
- Edit Family Data – This is the only area in Solo where a dependent can be deleted without an audit trail.

Edit Plan Number and Data – This is the only area in Solo where a COBRA Plan can be edited or deleted without an audit trail. You can also change the Plan Number. This can create significant problems with data integrity if used incorrectly.

3. SETUP OVERVIEW

Information to Have Ready

Before you start the set up process, try to have as much of the following information available as possible. And, please review the Set up Matrix to obtain an overview of how the "logic tree" is laid out for Vendors, Contracts, Plans, and Rates.

> Tip: It may be necessary to contact your insurance carriers or health plans to find out how they want you to structure your COBRA Plan rates.

1. Sample of your current COBRA Notice and Rate Sheet that displays the various COBRA plan rates and Coverage Classifications. This will guide you in establishing your Coverage Classifications.
2. For each of the COBRA Plans that you offer, have the following information available:

> Tip: If your renewal is just before or after the set up process, it may be necessary to enter both pre and post-renewal rates. For example, if your renewal is 1/1/05 and you are doing set up in 12/01, you may need to enter the rates for both 2004 and 2005.

- Vendor Names. The name of the companies issuing your COBRA Plan "Contracts" must be entered as a Vendor. If you have a self-funded benefit plan, review the special instructions.
- "Contract" Number - sometimes called a Policy Number or Group Number. If you have a self-funded benefit plan, review the special instructions.
- Next COBRA Plan Renewal Date.
- Next COBRA Plan Rate Change Date - usually coincides with the Renewal Date but can vary due to the COBRA rules on the Premium Determination Period.
- Premium Rates charged for each rate coverage classification.
- Grace Period for the COBRA premium payment. You must choose one Grace Period for all of your COBRA Contracts and Plans. The minimum by regulation is 30 days and that is the grace period used in the notices.
- Premium Due Date. You must choose one Premium Due Date for all COBRA Contracts and Plans. Even for pro-rated plans, it can be the first of a month by pro-rating the first and last months.
- Date that Active Plan Coverage Ends. Default is the End of the Month. The other choice is the day after the Qualifying Event and, then, you would have a pro-rated first month and last month premium amount.

Required Data - Red Data Fields

When you see a red data field, you will know that you need to enter data or make a choice from the options available to you. If you forget, Solo will not let you Exit.

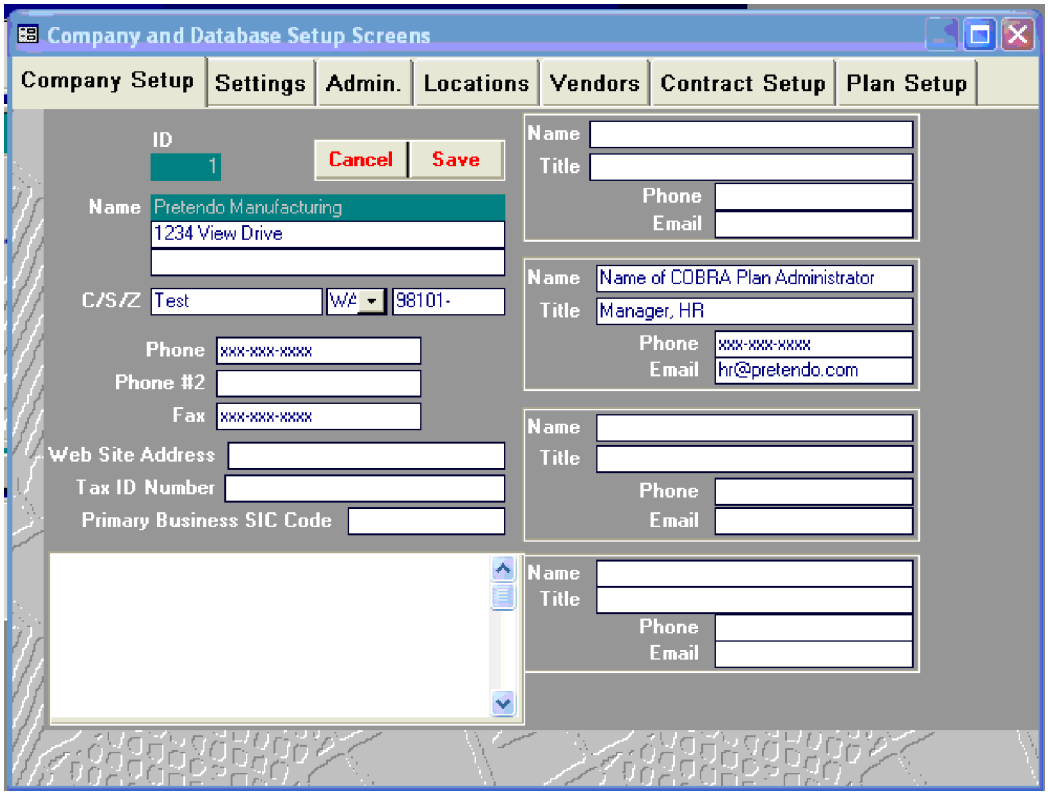
4. SETUP MODULE OVERVIEW AND PROCEDURES

Overview - Seven Tabs - Work Left to Right

There are seven file folders reading from left to right and you, typically, perform each setup task working from left to right. When you are finished with the Setup Module, you will want to close Solo and go to the Solo Template Editor.

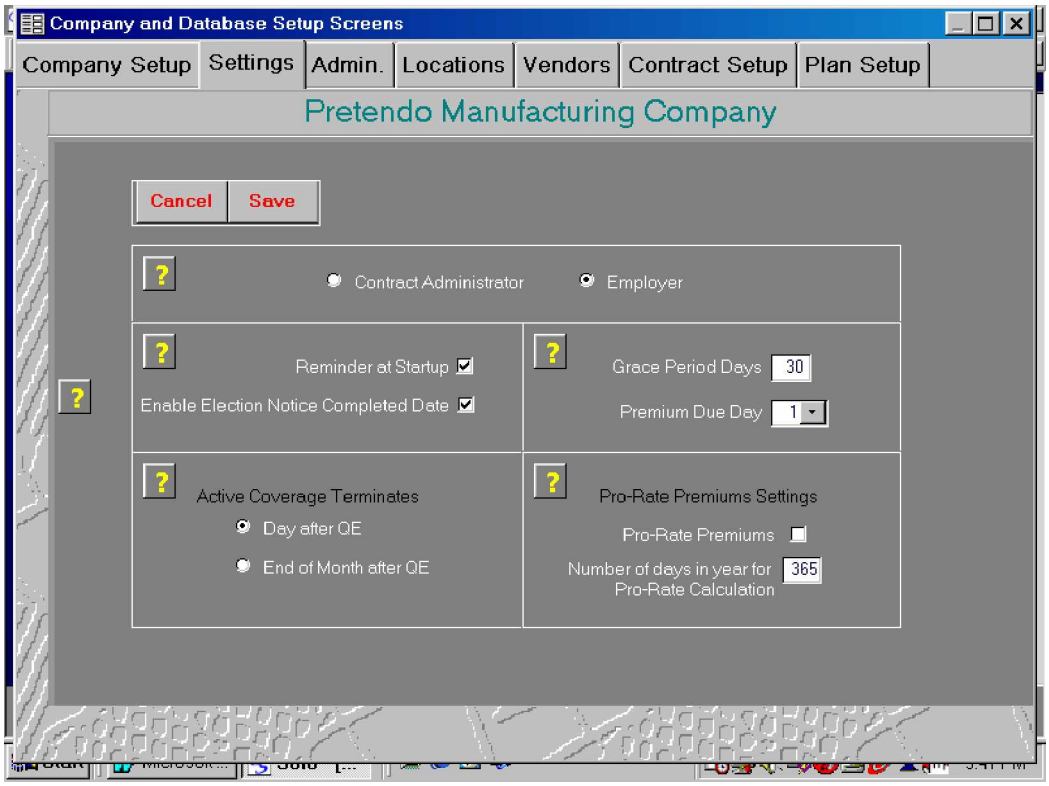
Tab One: Company Setup

The company name, address, phone and fax are required along with the second set of contact data fields must be completed.



Tab Two: Settings Menu – Global Settings

The Settings Menu is critical to the proper functioning of Solo and must be completed with care. The following is a graphic of the Settings Menu.



Employer or Contract Administrator

This controls the deadline for issuing the Election Notice. Choose Employer unless you are a Contract Administrator (COBRA TPA).

Grace Period

The minimum required by the Regulations is 30 days. You must select one grace period for all COBRA Plans. The COBRA notices reference a 30 day grace period and you would need to edit them if you chose a different grace period.

Premium Due Day

You must select one premium due day for all COBRA Plans. Typically, premiums are due on the first day of the month.

Reminder at Start-Up

Default is "yes". This can turn the Reminder Report pop-up screen off or on.

Enable Election Notice Completed Date

Default is "yes". This allows you to manually enter the Election Notice Completed date in Print Election or Print General Notice.

Active Coverage Ends

The default is End of the Month after the Qualifying Event. The other choice is the day after the Qualifying Event. If the latter, you will need to pro-rate premiums.

Pro-Rate Premiums

If you pro-rate the first and last month's premiums, check this box and make sure that the default calculation is satisfactory.

Number of Days in year for Pro-rate Calculations

Default is 365 days. This affects the calculation of the pro-rated premium amount.

Tab Three: Admin – Premium Payee and Contact Information

This information is displayed on many letters and reports. You can edit this data at any time and it will display on all future transmittal letters.

- Premium Payee Name. To whom the check or money order should be payable. This is printed on the Premium Payment Instructions and on the Coupons.
- Administrator's Name. This can be the name of the person in charge of COBRA for the Employer or that of a person responsible at the office of a Contract Administrator.
- Company Name. This can be Employer's name or that of the Contract Administrator.
- Address.
- City, State, and Zip.
- Phone – there is space for two numbers
- Fax
- Email

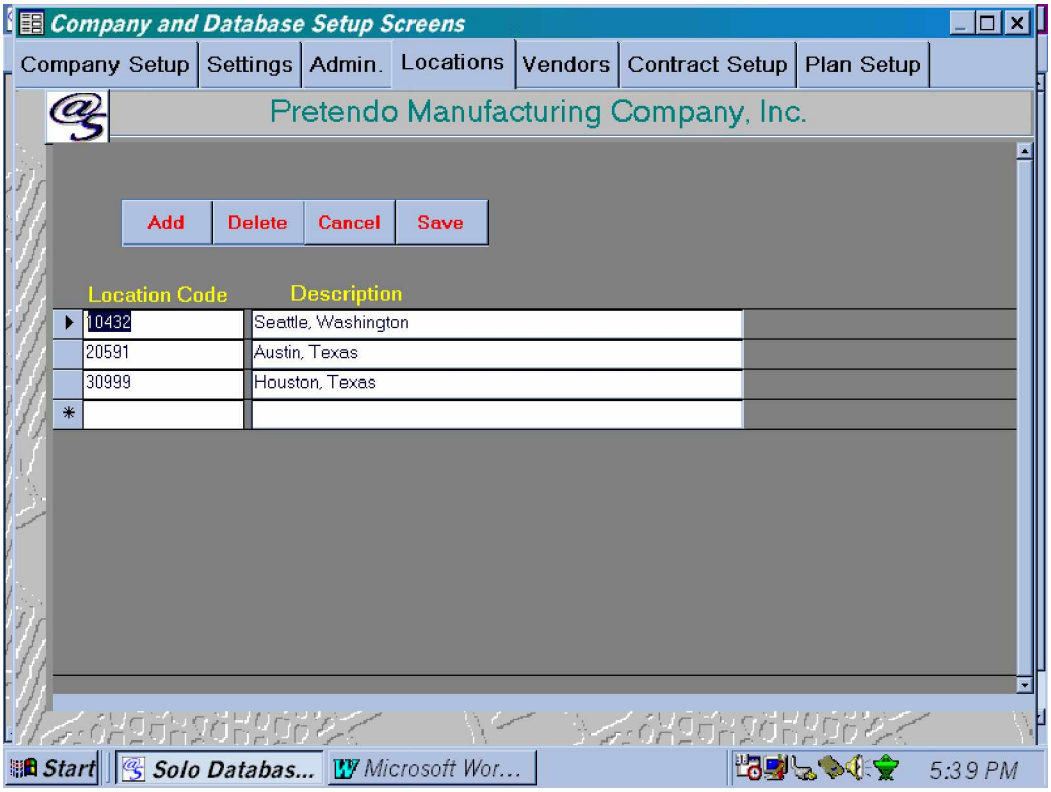
Tab Four: Company Locations - Optional

If you wish to track Active Employees or PQBs by "location", you will want to set up this area to reflect your company's unique location codes. There are three Reports that will sort by location.

Numeric Location Code - For identification purposes - Must Be Unique

Location Name - Does Not Need to Be Unique

Functions: Opens in the Edit Mode. To add a location, select the Add button and the cursor will go to the next empty line. To delete a Location, click on the left scroll bar and, then, use the Delete button on your keyboard. To edit an existing Location, just write over the current data. When done, click on either Save or, if you wish to cancel the data you entered, Cancel.



Tabs Five and Six: Vendors and Contracts

Before you get started, read the following overview of Vendors and Contracts (see below).

Sample Setup Matrix for a single employer.

If you are a COBRA TPA, you will use the company's number plus 100, 200, 300, etc. For example, company number 3 would have a plan number sequence of 3-100, 3-200, etc.

Vendor Name Abbreviation	BlueCross	Delta	Vision
Vendor Name	Blue Cross	Delta Dental	Vision Services
"Contract" Number	23567	3451	453

Plan Number	1-100	1-200	1-300
Plan Description	PPO Plan	Dental Plan	Vision Plan

Coverage Class or Rate Grouping			
Single Enrollee	$200.00	$35.00	$15.00
Ee/Spouse	$400.00	$70.00	$30.00
Adult and Children	$350.00	$60.00	$25.00
2 + Children	$400.00	$70.00	$30.00
Family	$600.00	$75.00	$45.00

What is a Vendor?

In the process of setting up your COBRA benefit plans and rates, you will start by entering data or information on your insurance companies or health plans as a Vendor. In the instance of self-funded ERISA Plans, the "Plan" is set up as a Vendor and, then, you assign a Contract Number.

What is a Contract? How is it Different from a COBRA Plan?

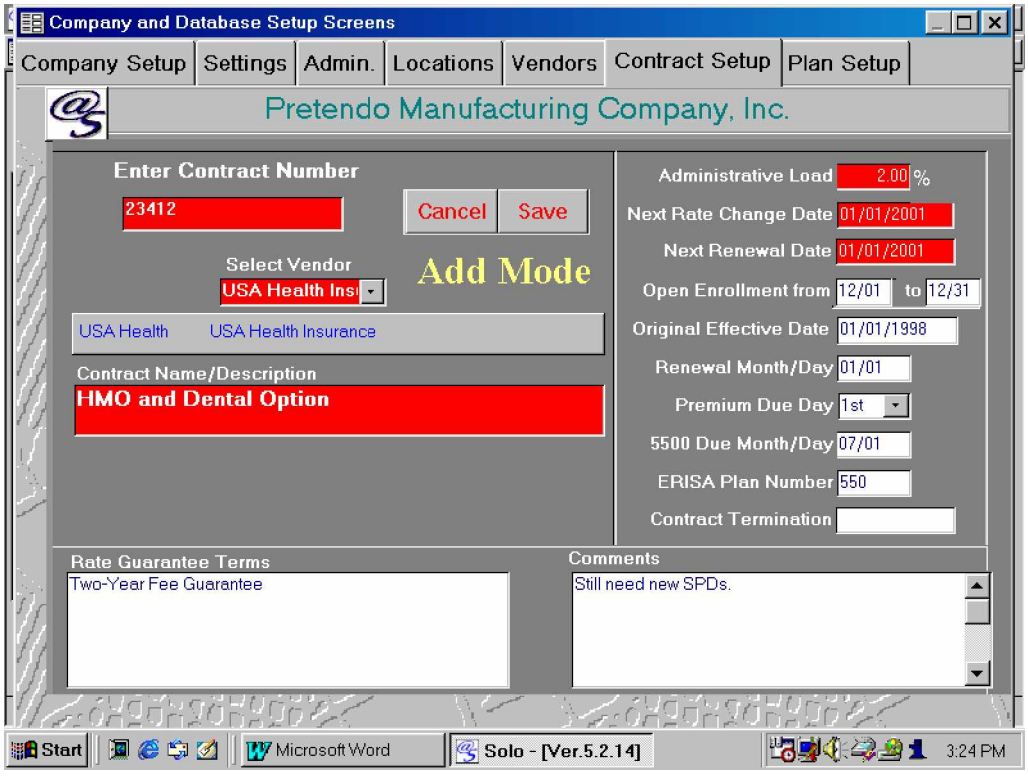
Contract is a generic term to describe what might be an insurance policy, administrative agreement or other type of agreement issued by a Vendor. It is possible for a Contract to have more than one COBRA Plan. For example, you may have a Medical PPO, Medical HMO, and Dental plan all with one carrier. Typically, the Contract Number will be provided to you.

Special: Self-Funded Plan

In the case of a self-funded ERISA Plan, the Vendor Name can be something like the following: "Pretendo Health and Welfare Plan". The Company's Self-Funded Plan is assigned a "Contract Number" that is, in most instances, created by the user.

Step One: Vendor Set up

The first step is to set up your Vendors. Of prime importance is to set up Vendors who have issued Contracts that will form the basis of your COBRA plan offerings. If you are a COBRA TPA, Vendors will be shared across all of your companies being administered.



Adding a Vendor:

1. Select Add.
2. Assign a Vendor Name Abbreviation. This should be an easy to remember. For example, instead of XYZ Insurance Carrier, you could use XYZ. There is a limit of ten characters, including spaces. You cannot use apostrophes. Warning: You cannot edit the Vendor Name

Abbreviation. If the Vendor Name Abbreviation is wrong, you must delete the entire Vendor and start over.

3. Enter the Vendor Name.
4. If desired, complete the balance of the Vendor categories.

Step Two: Contract Setup

After you have set up your key Vendors, you will begin setting up your Contracts.

Add a Contract:

1. Select Add.
2. Enter a unique "Contract Number" no longer than 20 characters. This "master" number cannot be edited after you click on Save. If you make an error, you can either delete the Contract or change it at the Plan level in Edit Plan Data from Utilities on the main menu bar.
3. Select the Primary Vendor from the options in the drop-down box.
4. Complete the Contract Name/Description. For example, "HMO and Dental Plan".
5. Enter the Administrative Load Percentage.
6. Enter the Next Rate Change Date.
7. Enter the Next Renewal Date.

The following are optional and do not appear on any reports:

8. Open Enrollment dates.
9. Original Effective Date.
10. Renewal Month/Day.
11. Premium Due Day.
12. Form 5500 Due Month/Day.
13. ERISA Plan number.
14. Contract Termination Date.
15. Contract terms.
16. Comments.

Terminate a Contract

If you terminate a Contract, you will also need to terminate each Benefit Plan associated with that Contract and each Premium Rate.

Delete a Contract

If you need to delete a Contract, select the Contract from the drop-down box and click on the Delete button.

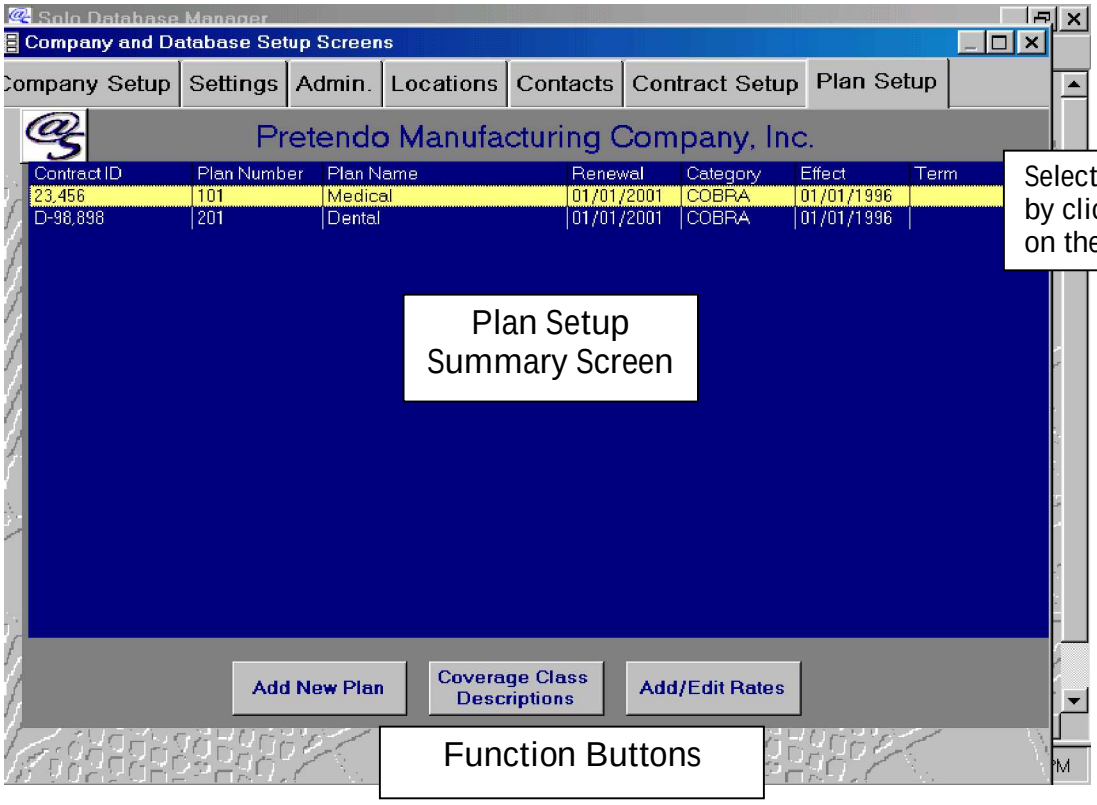
Edit a Contract Number

If you make an error in the Contract Number, you can change it at the Plan level in Edit Plan Data from Utilities on the main menu bar. This will not edit the master entry displayed on the Contract Setup tab but it will change it on the Plan level. In general, this will solve the problem.

Tab Seven: COBRA Plan and Rate Setup

Overview – Plan Setup Summary Screen - Big Blue Screen

When you first use Solo, this blue screen will be blank and you will start the process by Adding your COBRA Plans and Rates. After you have entered your Plan(s), they will be displayed.



Plan Setup Summary Screen Organization

To Add a new COBRA Plan, click on the Add button. To Edit or enter rates for a COBRA Plan, highlight the plan with your mouse and click on the Add/Edit Rates button. If you need to edit the Coverage Classification Descriptions available to you, click on the button.

Set up COBRA Plans - Background - Two Step Process

Setting-up a new benefit plan is a two step process. First, you will establish each COBRA Benefit Plan and Rate Grouping and, then, you will enter the COBRA Rates for each Plan.

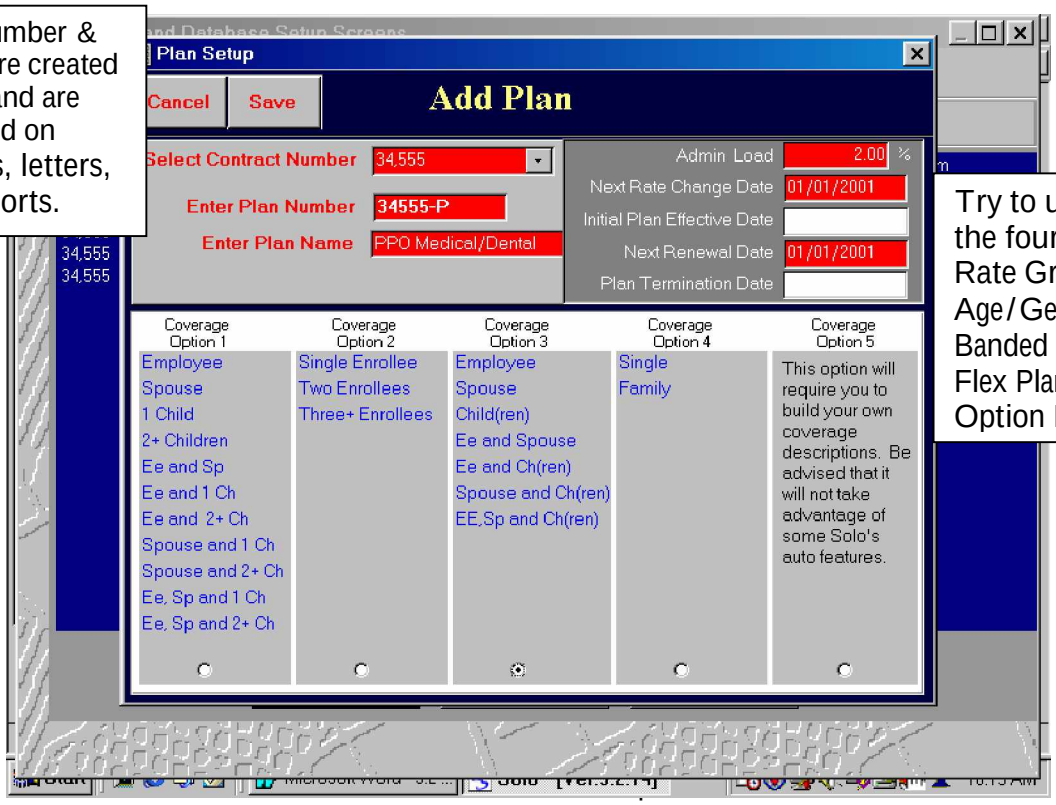
What is a COBRA Benefit Plan?

A Contract may have multiple benefit plans with sub-numbers because of differing plan design or rates. For example, you may have an HMO and a PPO Plan. Or, higher rates for a Social Security Disability Extension will necessitate a second benefit plan to be set up under the same Contract Number. Please refer to the Sample Matrix. Tip: Reports Sort by COBRA Plan Number

Step One: Set Up the COBRA Plans

1. Click on the ADD NEW PLAN icon at the bottom of the screen.

Plan Number & Name are created by you and are displayed on Notices, letters, and reports.



Try to use one of the four standard Rate Groupings! Age/Gender Banded Rates or Flex Plans will use Option Five.

3. Enter a unique Plan Number. If you are a single employer, this can be the same as your Contract Number. But, if you want your plans to sort in a certain order, use your company number plus 100, 200, 300, etc. An example would be 1-100, 1-200, 1-300. See the sample matrix for an example. If you are a COBRA TPA, you will use the company's number plus 100, 200, 300, etc. For example, company number 3 would have a plan number sequence of 3-100, 3-200, etc.
4. Enter a Plan Name. This description will be on many letters and reports and should be concise. It can be edited later.
5. The Administrative Load amount will be completed for you from the entry in Contracts. If it is different for a specific plan, it can be edited at the plan level. This will be used to calculate your COBRA Rates.
6. The Next COBRA Rate Change Date will be completed for you from the entry in Contracts. This date can be edited.
7. The Next COBRA Renewal Date will be completed for you from the entry in Contracts. This date can be edited.
8. Generally, you will not be entering a Plan Termination Date at this time unless you are establishing a retroactive plan history.
9. Select the most appropriate COBRA Rate Grouping one through four. Do not use rate grouping five unless you are setting up age rated plans or a health FSA.
10. Save and Continue Entering Plans or Exit. You can continue entering Benefit Plans or you can Exit Add Plans.

Delete an Entire Contract and Benefit Plan(s)

Generally, you will do this only when the information was entered in complete error. To completely remove all of the data from Solo, you need to go through a reverse entry process. You delete the Plans first and, then, the Contracts and, finally, the Vendor.

1. In Utilities and, then, Edit from the Menu Bar select Plan Data Records. Highlight the Plan you wish to Delete and click on the Delete button.
2. Delete the Contract. Select the Contract from the drop-down list and click on Delete.
3. Delete the Vendor.

Edit a COBRA Plan Number

To edit a Plan Number, use Edit Plan Data from Edit on the Menu Bar.

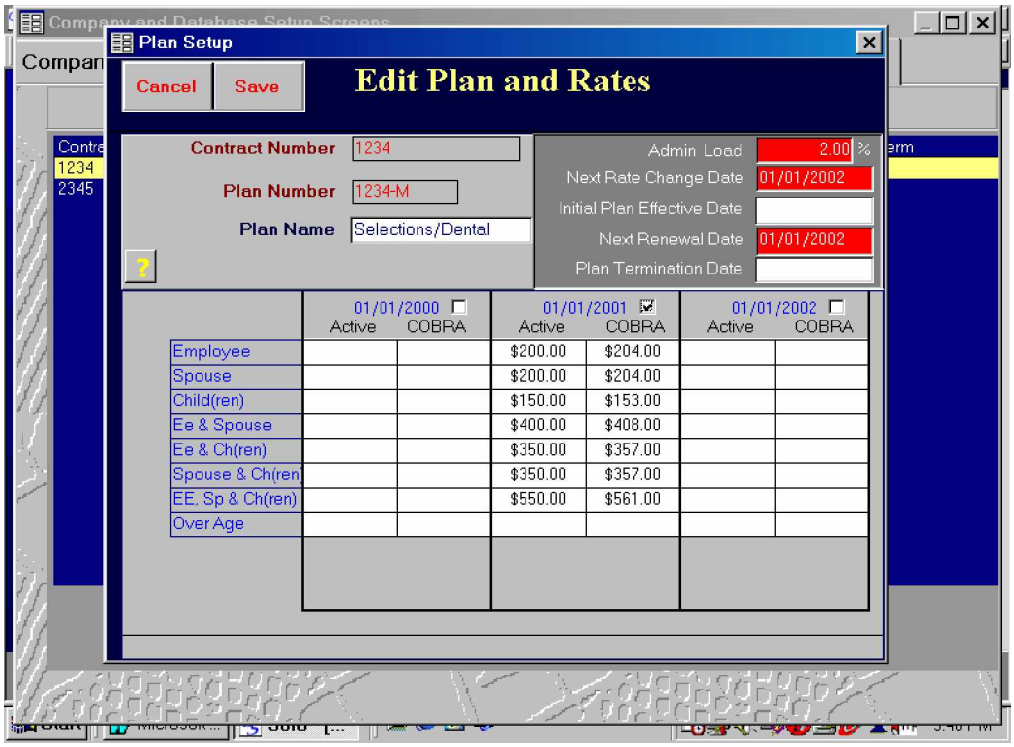
Delete a COBRA Plan

If you need to delete a COBRA Plan, you use Edit Plan Data fromUtilities on the main menu bar.l.

Step Two: Enter Your COBRA Plan Rates

When you return to the Benefit Plan Summary screen, you will need to select, by placing your mouse cursor anywhere on the row and clicking, the benefit plan for which you want to enter rates. Then, Click on Add/Edit Rates at the bottom of the screen.

1. In the rate matrix at the bottom enter your active plan premium rate. Based on the Admin. Load entered, your COBRA rate will be automatically calculated. You can edit the rate if the rounding is slightly off. If you want to calculate and enter your own COBRA Rate or Flex Plan Amount, leave the Admin Load field blank when setting up the Contract or the COBRA Plan.
2. Choose Save or Cancel. Repeat the process until all rates are entered.



Rates for Multiple Plan Years

If your renewal is just before or after the setup process, it may be necessary to enter both pre and post-renewal rates. If you are entering multiple sets of rates, by default, all rates will be displayed.

Displaying COBRA Rates for Multiple Years

To control the display of rates in Design Election Notice and Elections, use the check boxes above the rate column.

Update Rates in Setup

If you are not changing plans, the process is easy. Go to Plan Setup, highlight the plan you wish to update, click on Add/Edit Rates and, then, when the form opens, enter the new active rates in the renewal year's column set. Click the box next to the effective at the top of the column set. Change the Next Renewal Date and the Next Rate Change Date.

Next Renewal Date – Change at Renewal!

To initiate the renewal process, enter the Next Renewal Date. A new rate column will appear.

Next Scheduled Rate Change Date – Change at Renewal!

To complete the renewal process, it is important that this date be changed. Before you use Solo the first time after the renewal date, you should make this change. If you change the date too early, incorrect dates may appear on various letters and reports.

5. CUSTOM RATE GROUPINGS, AGE BANDED RATES AND HEALTH FSAS

Custom Rate Groupings - When Used

If you cannot use of the Standard Rate Groupings during Plan Setup, you will need to use Category Five - Custom Rate Grouping. In particular, if you have an age rated plan or health FSA, you will need to use this category.

If you use the Custom COBRA Rate Group, you are able to create your own coverage classes to reflect those of your insurance carrier or health plan. You can access the Coverage Class Descriptions from the bottom of the Plan Setup Summary Screen. You can add more Coverage Class Descriptions by clicking on the Add button at the bottom of the screen.

In many instances, the easiest approach is to establish a unique coverage class description and abbreviation for each PQB. And, then, assign a rate to it. On the other hand, if you have high turnover, it may be worth your time to create the complete matrix. See the next page for those guidelines.

NOTE: If there are family members who are Qualified Beneficiaries, it will be necessary to *edit* the Election Form for dependents in the Solo Template Editor. You will need to add some language advising them to contact you if they need additional COBRA Rate combinations. For example, if the Qualified Beneficiaries are an employee and spouse, on the Election Form the employee/spouse rate only will be displayed. Therefore, if only the employee or the spouse is interested in electing, they will need to contact you for those unique rates.

Flex Plan Amounts

If a Qualified Beneficiary wishes to continue a Flex Plan contribution, it is possible to set up each unique Flex Amount as a "premium" rate. It is easiest to do this just before you issue the Election Notice. In order to keep your Design Election Notice and Elections options uncluttered, you can remove a rate from the View Mode once you have completed the process. Please refer to the section Benefit Plan Rate Display.

Example of a custom rate grouping when completed:

Coverage Class Description	Cov. Class Abrev.	Assigned Rate
John Smith – EE/Spouse	Smith Ee/Sp	$450.00
Mary Jones – Ee Only	Jones Ee	$250.00
Bob Ray – HAS Amount	Roy FSA	$102.00

General Procedure

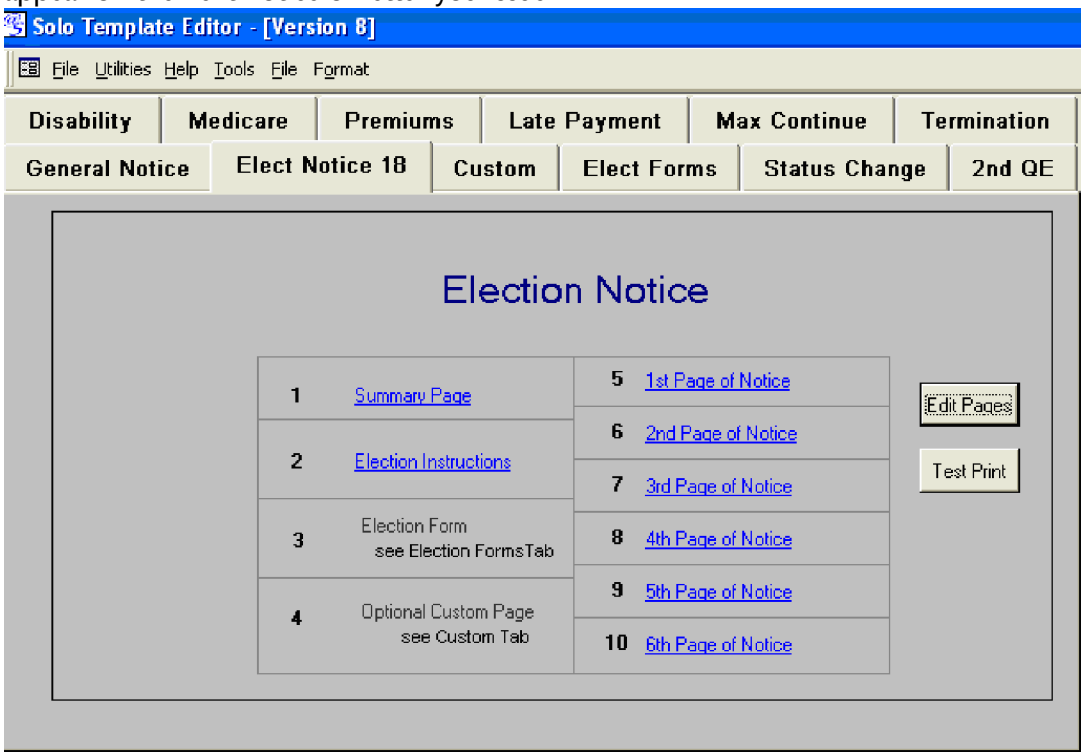
1. During the Add New Plan process, select Rate Grouping Five.
2. Each time you need to issue an Election Notice, go to Coverage Descriptions and set up the Coverage Class Description and Coverage Class Abbreviation.
3. Finally, you need to assign a rate to the Coverage Class Abbreviation. Highlight the Plan and, then, click on Add/Edit Rates.
4. From the next screen, click on the Add button and the Add Rate box will open. Complete the data boxes. The termination date should be blank if it is an active rate.

6. ENTERING ENROLLED QUALIFIED BENEFICIARIES

If you have qualified beneficiaries enrolled on COBRA at the time of set up, you can enter them and have Solo help you with the tracking and administration. Refer to your Quick Start Guide in Section I of your COBRA notebook for instructions.

7. SOLO TEMPLATE EDITOR

This feature requires Microsoft Word. The Template Editor allows you to review, for possible edits, the COBRA notices and other frequently used letters and notices. Once edited, the new text will appear on the next notice or letter you issue.



Affordable Solutions, Inc. and COBRA Management Services, LLC. (nor its re-sellers or partners) shall not be held responsible for any legal action taken against the Company, Plan Administrator or any user in any aspect of the programs' operation or its documents for COBRA non-compliance.

Menu Bar

- File: Close or Exit.
- Login: Change users or, if you are a COBRA TPA, change companies.
- Utilities: ReLink or Reconnect Data.
- Help: Link to the Set Up Manual or the User's Manual

Start the Review Process – Test Print

You will want to review all of the documents be fore you issue them for the first time. You can either view them or test print them.

1. Start by selecting the document (s) you wish to edit by clicking on the Tab.
2. Select the Notice. There may be more than one Notice in each tab.
3. Test Print.
4. Or, you can View each page of the document by clicking on the Page Number.

General Notice (previously the Initial Notice)

This is issued to an active plan participant and, if any, their spouse. With the exception of the Summary Page, it can be edited. If you wish to add additional text, you can use the custom Page. By checking the box, it will be printed with the Notice. If you are a COBRA TPA, you can have a unique optional Custom Page for each customer.

Election Notice

This is issued to qualified beneficiaries losing coverage due to a qualifying event. With the exception of the Summary Page, it can be edited. If you wish to add additional text, you can use the custom Page. By checking the box, it will be printed with the Notice. If you are a COBRA TPA, you can have a unique optional Custom Page for each customer.

Custom (pages)

You can create a custom page to print with a General or Election Notice. If you are a COBRA TPA, you can do this for each company. If you want it to print, check the Include box.

Election Form (for printing with a COBRA Notice for an initial qualifying event)

You can edit the default instructions. If you are a COBRA TPA, you can create custom instructions for each customer.

Second QE (qualifying event)

You may need to edit these forms to bring them into compliance with your own policy or those of your insurance carrier.

Disability - Disability Extension Forms

There are two notices. One is the cover letter and one is the election form. You may need to edit these forms to bring them into compliance with your own policy or those of your insurance carrier.

Premiums (payment instructions)

You may need to edit these forms to bring them into compliance with your own policy or those of your insurance carrier. If you are a COBRA TPA, you will have one set for all of your customers. This document can be edited “on the fly” for a specific qualified beneficiary during the print process

Maximum Continuation

You may need to edit these forms to bring them into compliance with your own policy or those of your insurance carrier. If you are a COBRA TPA, you will have one set for all of your customers. This document can be edited “on the fly” for a specific qualified beneficiary during the print process

Late Payment

You may need to edit these forms to bring them into compliance with your own policy or those of your insurance carrier. If you are a COBRA TPA, you will have one set for all of your customers. This document can be edited “on the fly” for a specific qualified beneficiary during the print process

Medicare

There are two documents. One for a PQB and one for a spouse. You may need to edit these forms to bring them into compliance with your own policy or those of your insurance carrier. If you are a

COBRA TPA, you will have one set for all of your customers. This document can be edited "on the fly" for a specific qualified beneficiary during the print process

Status

There are two pages. You may need to edit these forms to bring them into compliance with your own policy or those of your insurance carrier. If you are a COBRA TPA, you will have one set for all of your customers.

Termination

You may need to edit these forms to bring them into compliance with your own policy or those of your insurance carrier. If you are a COBRA TPA, you will have one set for all of your customers. This document can be edited "on the fly" for a specific qualified beneficiary during the print process.

8. BASIC EDIT PROCEDURE

The Template Editor has sample Notices, Election Forms and other letters to help you get started with creating your own personalized notification documents. Editing may be necessary to bring these samples into compliance with your health plans' and your own company policies.

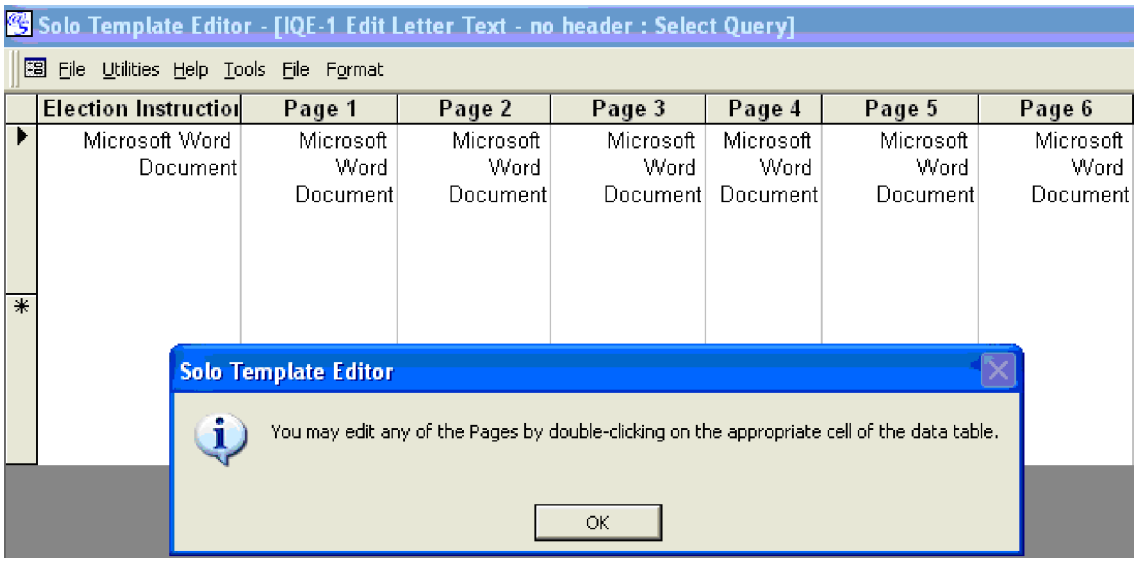
1. Start by selecting the Notice or letter you wish to edit and test print.
2. Review and, as appropriate, edit the text. To begin the Editing process, click on Edit pages. A screen will open that will display, from left to right, the text pages that can be selected for editing by click on "Microsoft Word Document."

Complex Edits – Including Deleting and Replacing the Text

It is important to understand that you are creating an image in Microsoft Word that must fit exactly into the "frame" for each page within Solo. You may need to copy and paste text between pages.

Troubleshoot Printing – Extra Pages

When printing, if you have extra pages or some other unexpected result, double check that your Page Margins are ALL set to zero. Go to "File" and select "Page Setup".


Solo Template Editor - [IQE-1 Edit Letter Text - no header : Select Query]
File Utilities Help Tools File Format
Election Instructio
Page 1
Page 2
Page 3
Page 4
Page 5
Page 6
Microsoft Word Document
Solo Template Editor
You may edit any of the Pages by double-clicking on the appropriate cell of the data table.
OK

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